

NC eProcurement

Reporting

STATE DEPARTMENT STATE BRANCH
LOCAL GOVERNMENT CITY COUNTY
COMMUNITY COLLEGE PUBLIC SCHOOLS
NORTH CAROLINA ePROCUREMENT PURCHASING
ONLINE SHOPPING STATEWIDE TERM CONTRACTS
ELECTRONIC VENDOR PORTAL HUB CERTIFIED VENDOR
QUOTE PUNCHOUT CATALOG
PURCHASE ORDER
SOURCING
BIDDING
BUY

NC eProcurement Reports are designed to provide users with access to a variety of procurement information captured within the system. The information includes order summaries based on supplier, purchase requisitions waiting to be approved, and summaries by entity. NC eProcurement offers two types of reports, **Public Reports** and **Prepackaged Reports**.

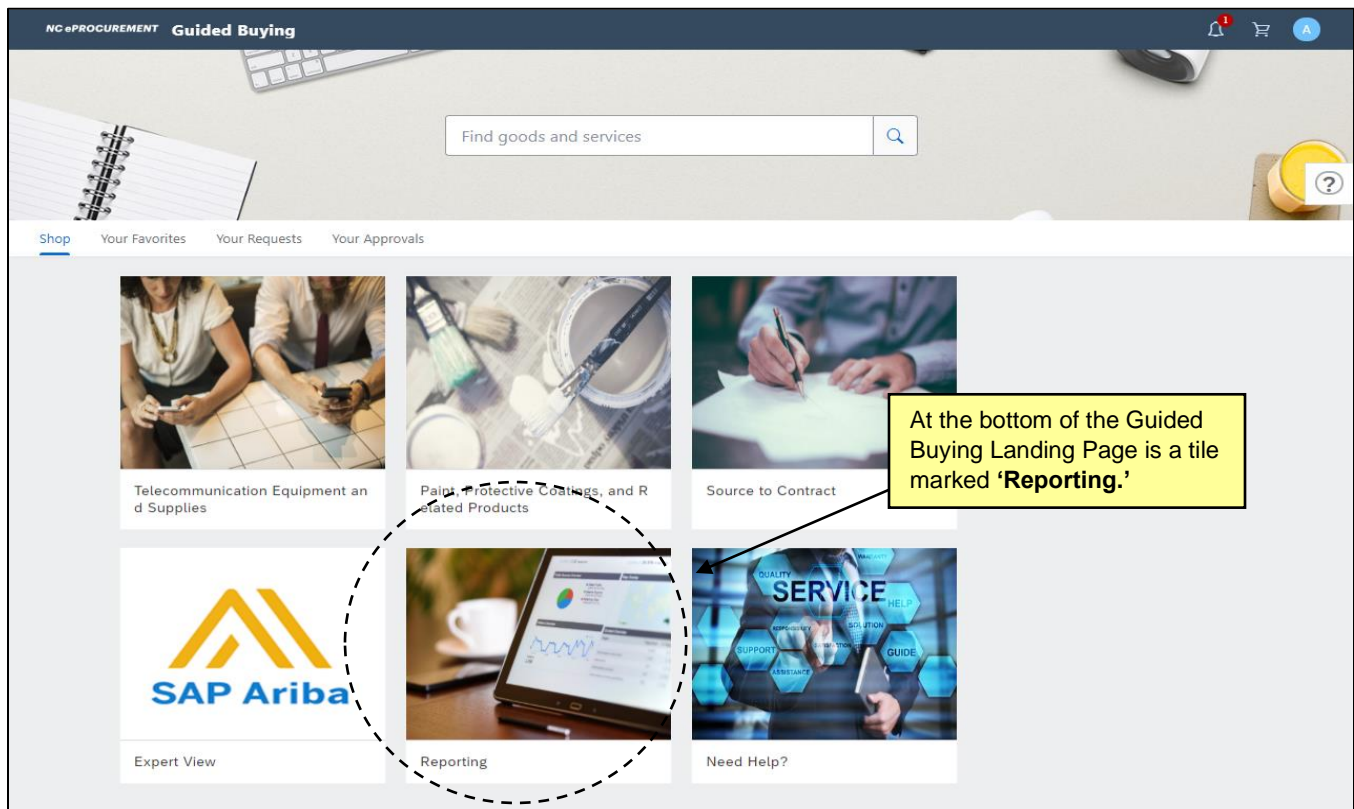
Public Reports are reports created specifically for NC eProcurement with useful information tailored to our users. Examples of Public Reports include '**NCAS Open Transactions**' and '**Punchout Audit**' reports. **Prepackaged Reports**, on the other hand, are created by Ariba and are built into the tool itself. As such, there may be several Prepackaged Reports that do not necessarily apply to NC eProcurement users.

The reports are visible in HTML format and available in either Microsoft Excel or CSV format. Both formats may be downloaded and saved as files for future use.

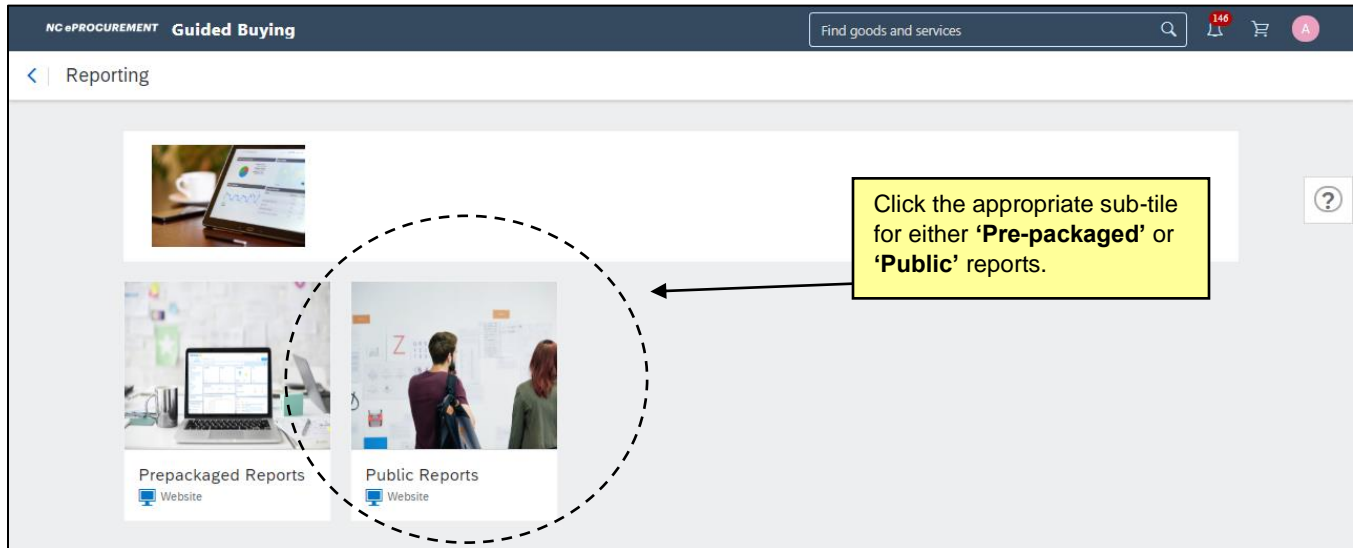
All users will be able to access reports, but saved reports will appear only within that user's profile. Users with '**Global Reporting**' permission have the ability to view purchasing data for State entities beyond their own. Users who have the '**NC Reporting User**' role will be able to create background reports (see **Section IV** for more details).

I. Accessing Reports in Guided Buying

1. Reports can be accessed through both the Guided Buying View and Expert View of NC eProcurement.
2. From the Guided Buying Landing Page click on the tile labeled '**Reporting**' toward the bottom of the screen.



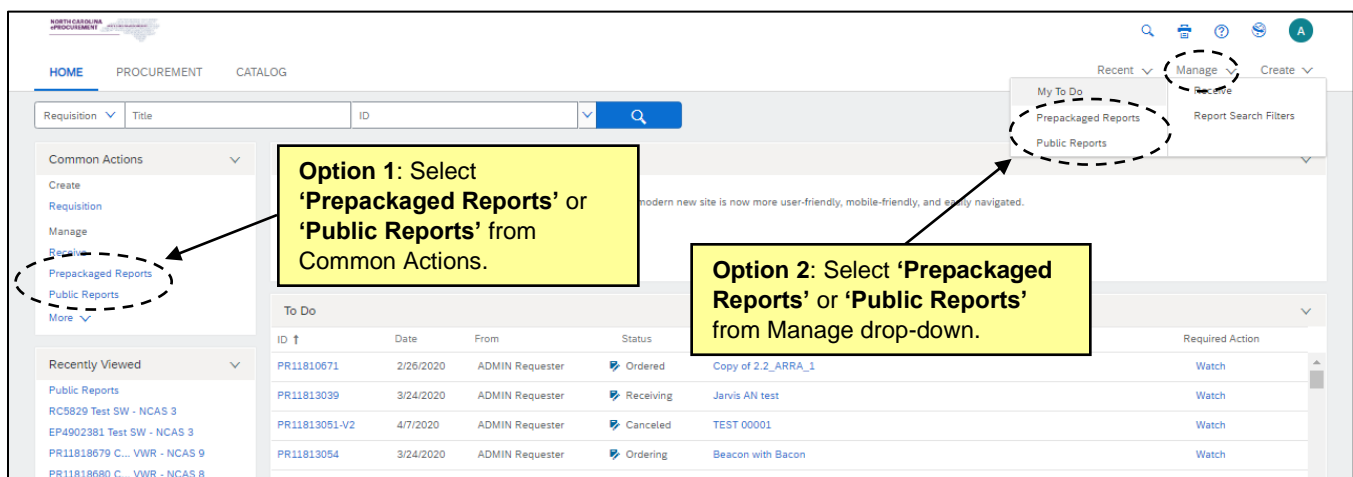
3. In the **'Reporting'** tile, locate the sub-tile that corresponds to the type of report desired, either **'Prepackaged Reports'** or a **'Public Reports'**.



4. The Report Selection page will display. See **Section III** for details on choosing and running the desired report.

II. Accessing Reports in Expert View

1. To access Reports through Expert View, there are two options:
 - a. Select **'Prepackaged Reports'** or **'Public Reports'** in the **'Common Actions'** portlet on the left side of the screen within either the **Home** or **Procurement** tabs.
 - b. In the upper right corner of the screen, click the **'Manage'** drop-down and select either the **'Prepackaged Reports'** or **'Public Reports'** button.



- ### III. Customizing and Running a Report

- Note:** Prepackaged Reports lists reports **alphabetically** by name with the owner listed to the right (always **'aribasystem'**). Public Reports are categorized in **folders**, with the creator of the report listed to the right. Only users in the **'NC Global Reporting'** group can create and publish a new public report.

-
- Prepackaged Reports**
- Prepackaged Reports
- Show Details Actions
- | Name | Owner |
|--|-------------|
| Approval Reports | aribasystem |
| Buyer Settlement Reports | aribasystem |
| Contingent Labor Analysis | aribasystem |
| Contract Reports | aribasystem |
| Financial Reports | aribasystem |
| General Templates | aribasystem |
| Payment Analysis Reports | aribasystem |
| PCard Reports | aribasystem |
| Procurement Content Reports | aribasystem |
| Purchase Order Reports | aribasystem |
| <div> <div>Action</div> <div>Open</div> <div>View Details</div> <div>Search</div> <div>Unlock Documents</div> <div>Create</div> <div>Shortcut</div> </div> | aribasystem |
| | aribasystem |
- Click the drop-down arrow next to the type of report, then select 'Open' to bring up the reports for that category.

-
- Click the drop-down arrow next to the name of the report, then select 'Open' to bring up the 'Refine Data' screen for that report.

- 3

- a. Relative date range (by year, quarter or month)
 - b. Fixed custom date range (by day)
 - c. And other filters dependent upon the report being run. Examples include **Supplier, Business Unit, Cost Center, Commodity, Catalog/Non-Catalog**, etc.
5. From the **'Refine Data'** screen, users can export the report directly, which will initiate a download into Excel or CSV format, or users can view the report within the NC eProcurement tool (HTML format).

Refine Data

Filter the data in your report by selecting values for the fields below. All reports include a date field filter. To select a different date field to use as a filter, select **Advanced Options**. For multi-fact reports, you can only filter on date fields from the main fact in this step.

Ordered Date (Calendar): * ☒ Relative date range

Time period: time period

Most recent: time period

Future: time period

☒ Include current partial month

☐ Fixed date range from: to:

☐ Advanced Options

Business Unit Id:

Common Supplier:

Cost Center:

Commodity (LL):

Buttons: View Report, Cancel, Export, Background

Callout 1: Selecting 'View Report' will display the report within the NC eProcurement tool. Selecting 'Cancel' will take users to the previous page. Selecting 'Export' will immediately begin downloading the report in Excel or CSV format.

Callout 2: Users can filter data returned in reports by selecting date ranges (relative or fixed) and additional report-specific filters.

6. Clicking on **'View Report'** brings up the Report Summary screen. From this screen, users can examine the returned data in text form in a Pivot Table, see the data represented in a chart, or view abbreviated summaries of both text and chart forms in a dashboard format.

Notes

- From the **'View Report'** page, users can go back to the **'Refine Data'** page to change inputs by clicking the **'Refine Data'** button on the top right of the screen.
- On the Pivot Table tab, users can view report data on a line-by-line basis using the **'Detailed View'** or view the data in a consolidated format using the **'Aggregate View.'**

Reporting Order Summary by Supplier

Users can select how to view the data by choosing the Pivot Table, Chart, or Dashboard tabs.

Users can also go back to refine the data differently, or export data from reports by clicking on the options at the top of the screen.

On the Pivot Table tab, users may have different options to change views between 'Aggregate View' and 'Detailed View'.

7. After a report is displayed, users can still perform the following actions:
 - a. **Edit:** Modify the configuration of the report via the reporting wizard.
 - b. **Save:** Save this version of the report to the user's '**Personal Workspace.**' A user's '**Personal Workspace**' will not appear under the '**Common Actions**' portlet until there is at least one saved report.
 - c. **Export:** Automatically begin downloading to the data to a CSV or Excel file
8. Within the Chart tab, users have several options to change the format of the visual representation of their data. Users can choose between Column, Line, Bar, Pie, Area, Donut, or combination charts. Selecting the '**More Chart Options**' tab allows users to add details to the chart such as making it 3-dimensional or adding data labels to the chart.

Reporting Order Summary by Supplier

Change the type of chart using this drop-down menu.

Add additional details to your chart such as value labels using the 'More Chart Options' tab.

Add charts to the Dashboard tab by clicking the 'Add to Dashboard' button.

- The Dashboard tab shows a summary of both the chart and pivot table tabs, and users can add specific charts to the dashboard by clicking the **'Add to Dashboard'** button.

Notes:

- Adding information to a dashboard is a method to quickly view data in different formats, and each chart in the dashboard tab will be included when the report is exported. The dashboard will also return the same charts the next time the same report is run. For example, adding a bar graph and pie chart to the dashboard allows the user to see both graphs allowing users to see multiple versions of the data in one location (e.g. a bar graph and pie chart).
- Adding a chart to a dashboard does not make it visible from the user's **'Home'** or **'Procurement'** tab in Expert View. To add a report to a user's **'Home'** or **'Procurement'** see **Section V**.

IV. Running Background Reports

- If a user has the **NC Reporting User** role, they will be able to run Background Reports which can run at set times without manual intervention.
- Background Reports can be scheduled to run once, or in regular intervals. After the report runs, the user will receive an email notification, which can also be set up to include the report as an attachment.
- To create a Background Report, select either **'Prepackaged Reports'** or **'Public Reports'** and find the desired report (See **Sections I-III** for more details on accessing and finding reports). When clicking the drop-down arrow next to the report, choose the **'Run In Background'** option.

Purchase Order Reports Show Detailed View

Purchase Order Reports Show Details Actions Grid Filter

| Name | Owner |
|---|-------------|
| Advance Payments by Supplier | aribasystem |
| Asset Data Report | aribasystem |
| Catalog vs. Non-Catalog order items | aribasystem |
| Commodity Analysis | aribasystem |
| Order Confirmation Report | aribasystem |
| Order Details by Commodity and Supplier | aribasystem |
| Order Summary by Commodity | aribasystem |
| Order Summary by Contract and Commodity | aribasystem |
| Order Summary by Contract and Cost Center | aribasystem |
| Order Summary by Cost Center | aribasystem |
| Order Summary by Supplier | aribasystem |
| Action | aribasystem |
| Open | aribasystem |
| Run In Background | aribasystem |
| View Stored Results | aribasystem |
| View Details | aribasystem |
| Export | aribasystem |

Users with the NC Reporting User role will see the additional option when selecting a report to **'Run In Background'**.

- After selecting which report to run in the background, users will see the **'Refine Data'** screen and can input the parameters of the report as in **Section III.4**. Then click the **'Background'** button.

Refine Data

Filter the data in your report by selecting values for the fields below. All reports include a date field filter. To select a different date field to use as a filter, select **Advanced Options**. For multi-fact reports, you [More](#)

Ordered Date (Calendar): * ☒ Relative date range

Time period: Year(s)

Most recent 2 time periods

Future 0 time periods

☒ include current partial year

☐ Fixed date range from: 1/1/2019 to: 12/31/2020

☐ Advanced Options

After setting the filters for the report, click the 'Background' button in the top right corner.

- Title the background report and click **'Save'** to keep the background report in the **'Personal Workspace'** to view and edit the background report later.

Save Report

You have changed this analytical report. Click **Save** to save your changes, or **Discard** to discard them.

* This is a shared analytical report. You don't have permission to modify it. However, you can save a copy in your personal folder.

Report Name: * Purchase Order Activity Background

Current Project: Personal Workspace

Choose a destination folder:

☒ Personal Workspace

Report User 1

Set the title for the background report and click the 'Save' button in the top right corner.

- After saving the report, the **'Schedule Background Report'** page will display. From this page, users may schedule the report through the following options:
 - 'None'**: Select this option to save the background report for future use without running the report at the time.
 - 'Run once as soon as possible'**: Select this option to run the background report once immediately. The report instance will be saved in the user's **'Personal Workspace.'**
 - 'Run once on'**: Select this option to have the report run only one time at a specified date and time.
 - 'Run once for each period of'**: Select this option to create recurring reports on a repeated basis. Users may set the time period, and the execution time of the reports, as well as the date range during which to run the background report. As an example, a user can set the report to run every 2 months, on the 1st of the month, at 7:00am, from June 1 through December 1.

7. At the bottom of the **'Schedule Background Report'** page, users may set the following specifications in the **'Report Details'** section of the page:

- a. **'Number of days or runs to keep'**: This field specifies the amount of time results are stored in the user's **'Personal Workspace'** for reports that have been run. Number of runs is the number of stored results to keep for recurring reports. For example, if the number of runs of a recurring report to keep is 3, when the report runs for the 4th time, the oldest result will be deleted.
- b. **'Attach report to notification email'**: Check the box to include an Excel version of the report in an email to recipients.

Note: If the report is not attached to the notification email, the recipients of the email will only be alerted that the report was successfully run. They will receive a summary stating only the number of rows of data in the report, but will not see any relevant data. The notification email recipients will also not be able to view the report within NC eProcurement.

- c. **'Recipient users'**: Click **'select'** for a list of internal (same entity) users to add as recipients of the notification emails when this report runs. Though not required, it is highly recommended that users add their own email to the list of recipients so they may verify the notification emails go out on time with the intended information.
- d. **'Recipient email addresses'**: Enter a list of external email addresses, separated by commas, that will receive notifications when this report runs. There is no limit on the number of email recipients, and users may send the email reports to email addresses that are not in NC eProcurement.

Schedule Background Report: Order Summary by Supplier [Save] [Cancel]

You can schedule analytical reports to run in the background at specific times and frequencies. Once you have scheduled the background report, you do not need to be [More](#)

Schedule

☐ None

☐ Run once as soon as possible

☐ Run once on: 6/17/2020 1:04 PM

☒ Run once for each period of: 1 Week(s) on: Monday at this time: 7:30 AM

Effective from: 6/17/2020 Effective to: 6/17/2022

Report Details

Number of days or runs to keep: 3

Attach report to notification email: ☒

Recipient users: Customer Support Admin [select]

Recipient email addresses: ncsp@test.com

Fields marked with * are required fields. By entering this personal data and clicking on the Save button, you acknowledge that you have authority to allow transfer of this personal data outside of the European Union or other jurisdiction in which you are located to Ariba for processing in the Ariba systems (hosted in various data centers globally) in accordance with the Ariba [Privacy Statement](#), the service agreement between your company and Ariba, and applicable law, and, if applicable, that any personal data from Russian citizens has been stored by your organization in a separate data repository residing within the Russian federation.

[Save] [Cancel]

- Click **'Save'** to save the background report to the user's **'Personal Workspace'** with the input parameters. On the next page, click **'OK'** to execute the background report based on the specified scheduling. The report will run automatically when scheduled.
- To edit a background report, the user must open it from their 'Personal Workspace' and make any necessary changes.

V. Adding Reports as a Portlet

- Users who want to view reports quickly may add commonly used reports as a portlet on the **'Home'** or **'Procurement'** tab. Users may also add a portlet containing a folder of commonly used reports.
- To begin adding a reporting portlet, navigate to the desired tab and select the **'Configure Tabs'** wrench icon. From the drop-down menu, select **'Add Content.'**

NC eProcurement Reporting

Select 'Add Content' from 'Configure Tabs' drop-down.

| ID | Date | From | Status ↑ | Title |
|---------------|----------|-----------------|-----------|-------------------------|
| PR11813051-V2 | 4/7/2020 | ADMIN Requester | Canceled | TEST 00001 |
| PR13784-V2 | 1/3/2020 | ADMIN Requester | Canceled | Test 123 |
| RC902 | | ADMIN Requester | Composing | Test 8 |
| RC609 | | ADMIN Requester | Composing | Test 123 |
| RC1256 | | ADMIN Requester | Composing | Test Federal Award ARRA |
| RC3475 | | ADMIN Requester | Composing | Test Tolerance 3.10 |
| RC020 | | ADMIN Requester | Composing | Test 42 |

3. In the 'Add Content' pop-up window, select whether to add a **Chart/Table**, a **Folder**, or a **Summarized View** of a report to the tab.

Choose the type of Reports content to add to the tab.

| ID | Date | From | Status ↑ | Title |
|---------------|----------|-----------------|-----------|-------------------------|
| PR11813051-V2 | 4/7/2020 | ADMIN Requester | Canceled | TEST 00001 |
| PR13784-V2 | 1/3/2020 | ADMIN Requester | Canceled | Test 123 |
| RC902 | | ADMIN Requester | Composing | Test 8 |
| RC609 | | ADMIN Requester | Composing | Test 123 |
| RC1256 | | ADMIN Requester | Composing | Test Federal Award ARRA |
| RC3475 | | ADMIN Requester | Composing | Test Tolerance 3.10 |
| RC020 | | ADMIN Requester | Composing | Test 42 |

4. After selecting the content type, choose the specific report to add to the tab by navigating the same report folders in **Section III** of this job aid.

NC eProcurement Reporting

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BUY

Select Report

To select a report, navigate your folders to find the report you want. To view the contents of a folder, click ► to expand it or click the folder name to open it. Choose whether to view the report in table or chart format from the pull- More

☐ Search ☒ Explore

Quick Links

☐ Ariba Prepackaged Reports ☒ Public Reports

Vault > New Projects > Public Reports

Name

▼ Buying Reports

► Approval Workflow Reports

▼ Purchase Order Reports

► Catalog vs. Non-Catalog Orders ▼

► Order Details ▼

► Order Details Extended ▼

► Order Summary ▼

5. Click the drop-down arrow to the right of the selected report, and choose the type of data to be added to the tab.

Select Report

To select a report, navigate your folders to find the report you want. To view the contents of a folder, click ► to expand it or click the folder name to open it. Choose whether to view the report in table or chart format from the pull- More

☐ Search ☒ Explore

Quick Links

☐ Ariba Prepackaged Reports ☒ Public Reports

Vault > New Projects > Public Reports

Name

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► Catalog vs. Non-Catalog Orders ▼

► Order Details ▼

► Order Details Extended ▼

► Order Summary ▼

► Purchase Order Reconciliation ▼

► Receipt Reports

► Requisition Reports

► Contract Reports

► Contract Workspaces to Expire in Next 30 Days

► Requisition, Ariba Technical Support ▼

► Test - Requisition Summary ▼

Standard Type

Table

Pie

Bar

Column

Line

Area

Donut

Combination

2-Measure Custom Type

Columns on 2-Axes

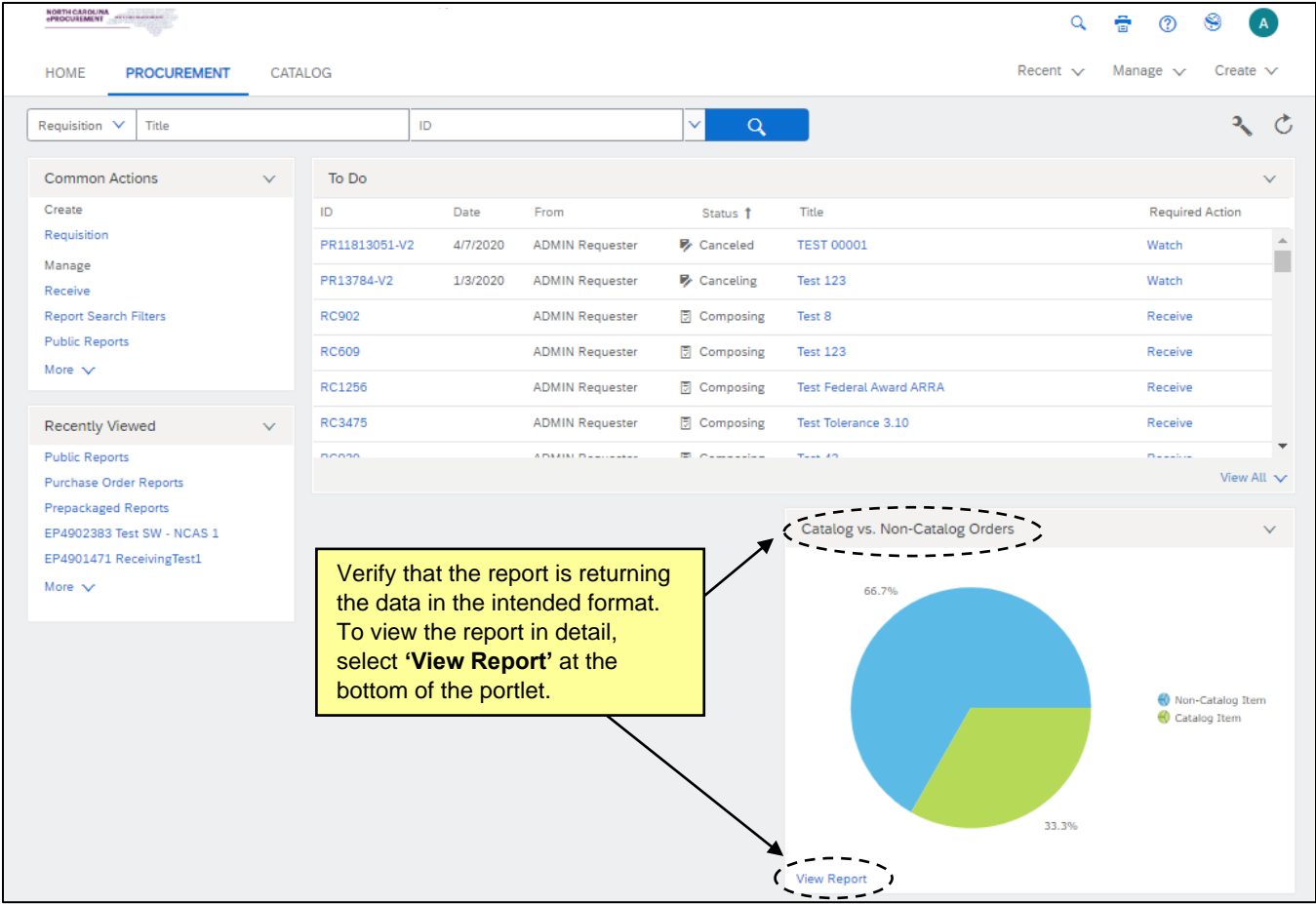
Column - Line on 2-Axes

Lines on 2-Axes

Line - Column on 2-Axes

NC eProcurement Reporting

- Verify the report shows the intended data on the tab. To quickly access the report, select the **‘View Report’** option at the bottom of the portlet, which will bring up the **‘Refine Data’** screen of the report.



- Users can add multiple reports portlets to their **‘Home’** or **‘Procurement’** tabs which will update in real-time. To change, delete, move, or resize your portlets within the **‘Home’** or **‘Procurement’** tabs, see the **Getting Started** job aid.